

# COLLEGE COUNTS 529 FUND

2013 MARKETING PLAN

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1/24/13

# STRATEGY

In 2013, new initiatives will be set in place to increase the amount of CollegeCounts direct funds opened. This plan will include a dollar reallocation within the media mix as well as new functions promoted on the CollegeCounts529 site. The proposed shift in dollar allocation is a direct result of the information gained from UBT's new account data, along with CollegeCounts529.com website analytics.

The goal of advertising remains unchanged—to increase the amount of new accounts opened from the previous year. A variation in creative execution and message timing will help keep the brand fresh.

For the past two years, television and digital have been the two chief mediums utilized to deliver the CollegeCounts message. This strategy will be maintained in 2013 while increasing the emphasis on digital advertising. The new website functions will be promoted through an online-only campaign. Targeted public relations tactics will be designed to complement the media schedule.

# TACTICS

## MEDIA

### MEDIA GOAL

The media goal for 2013 is to continue to gain awareness and increase enrollments. By focusing more advertising dollars into a medium with measurable returns, different demographic targets can be tested and optimized throughout the year.

In 2013, Red Square Agency recommends a three-fold plan addressing:

- Expecting Parents/Parents of Toddlers
- May 529 Day
- End-of-Year Tax Savings

### MEDIA STRATEGY

Using television as the primary medium to support the 529 Day and End-of-Year flights, state coverage and awareness are easily achieved. Unlike other media, television has the unique ability to evoke emotion. The other main medium proposed is digital advertising. Digital drives immediate results with a call-to-action to enroll. Moving into 2013, the agency recommends continuing to use both media, but shifting a percentage of advertising dollars from television to digital.

#### Television

By targeting spots in local news content, the messages may reach a more financially conscious parent or grandparent. Many cable networks are also effective for targeting this group and can be considered and added into the television buys.

Television support will be given to 529 Day in 2013. Adding television to the media mix for this campaign will allow the message to be conveyed to a broader audience. Employing the combined benefits of sight and sound will help the delivery of the message.

December is a good month to associate the CollegeCounts529 Fund with the spirit of the holidays. Many family-oriented prime time specials during this time will provide the perfect context for the CollegeCounts529 Fund message. The creative message will be focused on giving a gift that counts, tax return benefits and the deadline of December 31.

## Digital

Digital advertising has proven very effective for driving traffic to the CollegeCounts529 website; 70 percent of the direct accounts were opened through the website. Refining the digital strategy for 2013 based off of this data is paramount.

The following media channels will be used to fulfill the campaign goals:

- Display with Behavioral Targeting and Remessaging
- Facebook
- Search Engine Marketing (SEM)
- eBlast

Display advertising will be purchased by behaviorally targeting ads to consumers focusing on year-end tax savings, parents and grandparents along with expecting parents. Including remessaging into the digital strategy allows for continued display advertising to “follow” potential consumers who have previously visited the CollegeCounts529 website. Remessaging is an extremely helpful component of digital advertising, especially with products or services that require extensive research and multi-step enrollment/purchasing processes. Remessaging was introduced to CollegeCounts in 2012 and proved to be a very successful component of the campaign.

Facebook continues to be a viable option for reaching a large audience and building relationships with current and potential customers. Through Facebook, messages can be shared and recommended in a non-intrusive and personal manner among networks of friends. Facebook will allow us to target specific profiles with status and interests that match our target.

Search Engine Marketing is vital to the continued growth in the number of digital consumers researching savings plan options. Paid SEM allows the CollegeCounts message to be served to potential consumers who are currently in the process of researching various plans. And because it's paid, the CollegeCounts message is guaranteed to appear on the first page of search results. In 2012, the SEM garnered hundreds of contacts to both the CollegeCounts website as well as through phone calls to the CollegeCounts hotline.

eBlasts will be more prominently used in 2013 due to their capability to target specific demographics and their detailed tracking ability. Several eBlasts will be deployed targeting specific demographics. This, coupled with a distinct creative message, will help the brand articulate specifically the benefits of the CollegeCounts529 Fund to each demographic group. These will be broken down in the following method:

- Grandparents
- Parents of Children 3-12
- Parents of Children 13-18
- Adults Interested in Personal Investing
- Parents of Children 0-18 – Tax Season (March)

Three additional eBlasts will be deployed during the year to coincide with the multi-medium campaigns:

Adults 35+ with Children and Grandparents

- 529 Day (May)
- Year-End Tax Saving (December)

Expecting Parents, Parents of Children Ages 0–3 (March–April)

- Expecting / New Parent Campaign

## GEOGRAPHY

The geographic target is the state of Alabama.

## DEMOGRAPHICS

TV

- Adults 35+

Digital

- Adults 30+ w/ Children
- Grandparents
- Finance/Investing

eBlasts (see above)

## CAMPAIGN TIMING

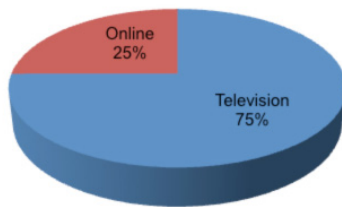
January through December

- 4 weeks – May 529 Day (4/29/13 – 5/29/13)
- 8 weeks – Expecting Parents/Parents of Toddlers (7/01/13 – 8/19/13)
- 6 weeks – End-of-Year Tax Savings (11/25/13 – 12/31/13)
- SEM – January – December

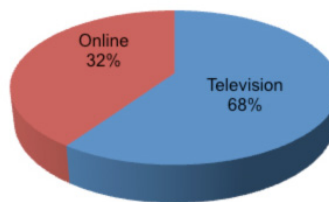
## MEDIA EVALUATION AND REPORTING

- Online Display and Facebook – The agency will provide monthly metrics reports throughout the campaign and will analyze and adapt strategy on a monthly basis to ensure media goals are met.

**2012 Media Spend**



**2013 Media Spend**



# PUBLIC RELATIONS/ PROMOTIONS

## 529 DAY

May is a month when higher education is top-of-mind, due to graduations and end of the school year preparations. As introduced in 2012, 529 Day will be promoted. This day will be used as an opportunity to initiate conversations about and promote 529 accounts.

## DIGITAL AND SOCIAL

Social media posts and maintenance promoting 529 Day will begin on May 1. Social media messaging will coordinate with media placement and PR to reinforce messaging.

Giveaways will be structured the same as the 2012 529 Day promotion. The giveaway is designed to attract more fans to the Facebook page, increase website traffic and promote conversation about CollegeCounts. The Facebook giveaway tab and website page will feature the creative designed for the 2012 promotion. Prize details will include:

- One \$529 prize to be given away each Friday in May (5/3, 5/10, 5/17, 5/24).
- One \$2,529 prize to be given away on 5/29 (\$4,645 total).

## PUBLIC RELATIONS PUSH AND EDITORIAL PLACEMENT

Feature stories will be pitched to long-lead financial, business and parent focused publications, as well as daily news publications throughout Alabama in the month of May. Possible story angles and publications include:

- 529 Day: The Best Day to Sign Up for a College Savings Plan
- 529 Day: Now College Savings is on Your Calendar

Parenting Magazines:

- Alabama Baby and Child
- Eastern Shore Parents
- Montgomery Parents
- Kids Life Magazine
- Birmingham Parent

Parenting Blogs:

- Mom-e-Centric
- Birmingham Mommy
- Eastern Shore Mom (Fairhope)
- Boys Rule My Life (No. Ala.)
- It's Gravy Baby
- Plum Wonderful
- Baby Mama Drama
- Alabama Parent Education Center
- The Incoherent Ramblings of a Stay at Home Mom
- Birmingham Bargain Moms

Financial Blogs:

- Hidden Wealth

Financial News:

- Birmingham Business Journal

## SOCIAL MEDIA MAINTENANCE AND MONITORING

Red Square Agency will provide ongoing maintenance of the CollegeCounts529 Facebook site including regular maintenance, daily updates, monitoring via Facebook Insights and media monitoring tools, and analytics/end-of-month reporting on growth and activity.



# PRODUCTION

## TELEVISION (CURRENT SPOT UPDATES)

- 529 Day – Voiceover fees, music license fees
- Edits performed to the end card or disclaimers

## ONLINE ADVERTISING

- Any external vendor costs to produce three series of three or four ads with different graphics and messages for Facebook and online display for each flight (baby and tax incentive)

## DIGITAL

- To promote the new sharing functionality of the website, a page explaining the process a user would take to get started will be produced. This will transition the user from being a prospect through setting up an account all the way to the share page. This new page will be promoted with the baby digital campaign.
- Any vendor fees associated with the creation of eBlasts.
- Production costs associated with additional functionality of the website.

# AGENCY FEES

All agency internal time to create all campaign elements including creative concept and design, copywriting, art direction, broadcast production supervision, communication with vendors and media outlets, planning and account service, management and reporting.

# COLLEGE COUNTS 529 2013 BUDGET

## MEDIA

Television	\$298,723
Digital	\$140,728
2012 Media Credits	-\$9,875

## PUBLIC RELATIONS/PROMOTIONS

PR/Promotions	\$10,000
Giveaway Prizes	\$9,645
Social Media Maintenance	\$30,000

## PRODUCTION

Television – 529 spot update	\$15,000
Digital	\$11,000

AGENCY FEES	\$60,000
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TOTAL	\$565,221
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